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BOSTON'S LINKAGE PROGRAM

*A New Approach To Managing
Linkage Funds For
Housing And Job Training*

October, 1998

Boston Municipal Research Bureau, Inc.

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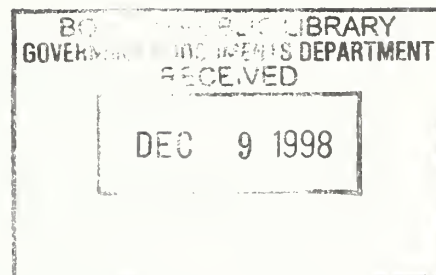
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The Boston Municipal Research Bureau is a nonprofit, member-supported research organization established in 1932 to study Boston's fiscal, management and administrative problems. Independent and nonpartisan, the Research Bureau is uniquely situated to develop objective, timely analysis and data that can facilitate discussion between the public and private sectors as to how to best address the critical issues facing the city.

The Research Bureau's continuous presence, objective analysis and credibility enables it to play a strong role in shaping the direction of Boston's public policy over a wide range of city issues. Over the years, the Research Bureau's research, reports and recommendations have led to new policies, new laws and important management improvements for Boston. The Bureau is successful in being a catalyst for change and an improved climate for businesses and residents in the City of Boston.

Acknowledgments

The Bureau gratefully appreciates the assistance and cooperation of the City of Boston employees who provided information for this report and worked with the Bureau to reconcile data. We are especially grateful for the efforts of the Treasury Department, Mayor's Housing Advisor, Department of Neighborhood Development, Mayor's Office of Jobs and Community Services, Boston Redevelopment Authority and the Office of the Chief Financial Officer.

Introduction

Boston is experiencing a new wave of development activity, a fact that brings greater attention to one of the key requirements of large scale projects ~ linkage. Linkage is a city-wide program developed in the early 1980s to ensure that the economic benefits of downtown development are directed into more affordable housing and jobs for neighborhood residents. Despite its intent, linkage does raise the cost of building and operating large scale projects in Boston. The linkage program is expected to generate over \$120 million in revenue over the next 30 years. If developers are required to participate in linkage as a condition of gaining zoning relief, they and the public should be confident that the linkage program is managed efficiently and that all linkage funds are spent responsibly to meet the real housing and job needs of Boston's residents. Analysis of the City's past management of linkage indicates that changes are needed to achieve that goal.

Linkage requires a large scale developer seeking zoning approval for a project to make a payment or an in-kind contribution to the City. These funds are used to increase affordable housing and support job training programs in Boston. However, despite this intended purpose, the linkage program is emerging from several years of problematic management. During its life, the linkage program has been hindered by inadequate record keeping, involvement of multiple departments with poor communication and no central oversight, lack of a reliable linkage process and a disjointed housing strategy. These problems have led to questionable and imprecise linkage data. Given these caveats, linkage is credited since 1986 with assisting in the creation of approximately 4,828 housing units and the support of 59 job training programs. Approximately, \$47.5 million in linkage funds has been collected for housing development and \$5.4 million for job training programs in Boston.

Over the past twenty-one months, the City has recognized the deficiencies of the linkage program and under the direction of the Chief Financial Officer (CFO) has taken steps to reconcile past financial records and establish new procedures for billing developers. Even so, the Bureau recommends several additional changes in the program to ensure efficient management and responsible execution of the program. One department should be designated to have overall responsibility for management of the linkage program. A policy manual outlining the responsibilities of all departments involved in the linkage program should be developed. The formal decision process for approving the use of linkage funds should be followed and not overridden by special agreements. A comprehensive housing policy for the entire City of Boston should be established.

What Is Linkage?

Linkage is a legislatively authorized program initiated by the City that requires large scale developers in Boston in need of zoning approval to make an exaction to the City. Zoning approval includes any relief that is granted under the Zoning Code for items such as zoning variances, exceptions, conditional use permits, interim planning permits, zoning map or text change or any other relief granted by the Zoning Commission or the Board of Appeal. Exactions are financial obligations that must be met by either a payment to the City or in-kind services. This exaction is used to increase affordable housing in the city as well as job training programs. In its infancy, linkage was designed as a “social contract” that would bring the benefits of downtown investment to neighborhood residents. Linkage was envisioned as a tool that would take a portion of the value created by investment in areas undergoing substantial development and direct that value to build affordable housing and provide jobs.

History Of Linkage

Linkage in Boston started in 1983 and since then has undergone many changes as well as legal challenges. Originally, linkage funds were used for affordable housing and later this use was expanded to include job training. In December of 1983, Mayor Kevin White and the Boston Zoning Commission approved the first version of Boston's linkage program, which became Article 26 of Boston's Zoning Code. The purpose of Article 26 was to balance new, large scale real estate development with the housing needs of Boston. Developers in need of zoning approval were required to either make a payment to the City or to contribute to the creation of low and moderate income housing.

Linkage was envisioned as a tool that would take a portion of the value created by investment... and direct that value to build affordable housing and provide jobs.

In 1986, linkage was expanded under Articles 26A and 26B. These Articles changed linkage in three ways: (1) Article 26A specified that all developers of “downtown” projects must pay linkage over a shorter time frame than developers of “neighborhood” projects, (2) Article 26B stipulated that linkage exactions also must be made for job training and (3) both Articles allow a percentage of the linkage funds collected from a specified area be used directly for housing and job training programs in that impacted neighborhood. Also in 1986, the Neighborhood Housing Trust (NHT) was established by ordinance to manage the linkage funds, followed by the establishment of the Neighborhood Jobs Trust (NJT) in 1987. Both of these Trusts are intended to be operated in accordance with their respective *Declaration of Trust* documents which outline operating procedures.

Following a legal challenge to Boston's establishment of linkage through the Zoning Code, the program was approved by the Legislature as a special act in 1987 (Chapter 371). Chapter 371 was initiated as a home rule petition submitted by the City to the Legislature seeking authority to impose linkage fees. This legislation was sought in response to a lawsuit against the City, filed in Suffolk Superior Court, that charged that the linkage exaction was an unlawful condition of zoning approval and an unauthorized tax beyond the authority of the Zoning Commission. The Superior Court agreed, concluding that the City lacked statutory authority to impose linkage fees. The victory was short-lived as the Supreme Judicial Court (SJC) reversed the lower court's judgment on the grounds that the plaintiffs in the case did not have standing to mount their challenge. However, the SJC recognized that the legality of Article 26 was an outstanding question that could be addressed through legislation rather than litigation. The City heeded this advice and succeeded in ensuring that the appropriate statutory authority was in place through passage of Chapter 371. Chapter 371, among other things, encompasses the linkage provisions of Articles 26, 26A and 26B. Finally, in 1996, linkage was incorporated into Article 80 of the Boston Zoning Code. Article 80 was the result of an effort by the City to streamline all zoning requirements into one document in order to facilitate the development process. Article 80B-7 outlines linkage requirements of all developers and includes the provisions of Articles 26, 26A and 26B.

How Linkage Works

Today, Boston's linkage program requires all developers to sign a Development Impact Project (DIP) agreement with the Boston Redevelopment Authority (BRA) for real estate projects that include either an expansion, significant rehabilitation of property or are new structures that require zoning and are 100,000 square feet or more. The DIP agreement is a contract in which the developer agrees to pay a DIP exaction, *a.k.a. linkage fee*, over a specified number of years at the set rate determined by law. Exactions are paid for two purposes: (1) the expansion of affordable housing and (2) the creation of jobs. Within each

LINKAGE HISTORY	
1983	- Article 26 ~ Housing only ↓
1986	- Articles 26A & 26B ~ Job training & shorter payment schedule for some areas ↓
1986	- Neighborhood Housing Trust established ↓
1987	- Neighborhood Jobs Trust established ↓
1987	- Chapter 371 - Ratified Linkage ↓
1996	- Article 80B-7 of the Zoning Code~ includes Articles 26, 26A & 26B

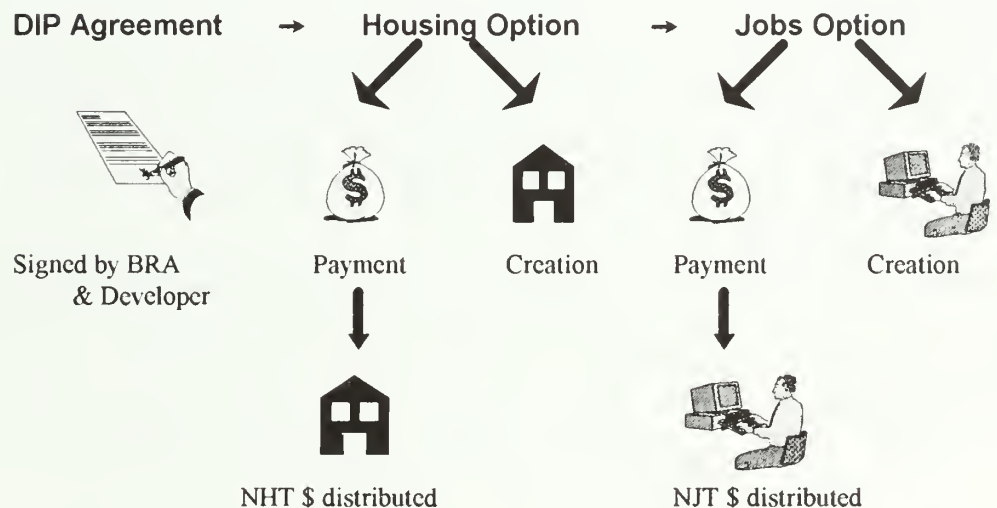
of these areas, a developer may choose to make a payment or build housing or create a job training program. The specific components of linkage are as follows:

- **HOUSING PAYMENT** ~ A *housing contribution grant* of \$5.00 for each square foot of gross floor area in excess of 100,000 square feet is required to be paid by the respective developer. The housing contribution grant must be made in seven or 12 equal annual installments. Developers of downtown projects must pay over seven years and developers of projects outside of the downtown area (neighborhoods) must pay over 12 years. If the developer elects, the entire amount due may be paid in year one (present value). Otherwise, for developers of neighborhood projects the first linkage payment is due upon either issuance of a certificate of occupancy or 24 months after the issuance of a building permit for the proposed project, whichever comes first. Developers of downtown projects must begin paying linkage when the building permit is issued. The remaining installments are due and payable annually on the anniversary of the first payment.
- **HOUSING CREATION** ~ As an alternative to a direct payment, developers may fulfill their linkage obligation by opting to be directly involved in *housing creation*. A housing creation option requires developers to either create new housing or assist in the creation of housing units for low and moderate income residents of the city. The cost of this creation must be equivalent to the housing payment the developer would have made. Housing creation proposals must conform with the BRA's written housing creation regulations. The regulations govern how a project comes to fruition by laying out a number of options developers may pursue such as directly creating housing through new construction, forming a joint venture, a general or limited partnership or channeling the net present value of the linkage obligation to an entity approved by the BRA to construct affordable housing. All housing creation proposals must be recommended by the NHT. However, they must be approved by the BRA after public hearing in order to go forward.
- **JOBS CONTRIBUTION PAYMENT** ~ A *jobs contribution grant* is required by developers in the amount of \$1.00 for each square foot of gross floor area in excess of 100,000 square feet. The jobs contribution grant must be paid in two equal installments, with the first due upon the issuance of a building permit for the project. The remaining payment is due on the one year anniversary of the first payment.
- **JOBS CREATION** ~ As in the housing exaction, developers may opt to not pay the jobs contribution grant, but instead utilize the jobs

The NHT and NJT are responsible for receiving the linkage payments... as well as approving the distribution of these funds.

creation option. Developers may create a job training program for city residents who will be employed on a permanent basis at the proposed project. Pursuing this avenue requires approval of the Mayor's Office of Jobs and Community Services (JCS) and the NJT.

- **ALLOCATION OF FUNDS** ~ The Trusts are responsible for awarding funds for housing or job training projects. The only guideline for awarding funds is found in Article 80B-7. Specifically, no less than 10% of any housing linkage payment made by projects located in the downtown area and 20% of the payments made by projects in the neighborhoods must be reserved for use in the area if housing is directly affected by the impact of the project. In both cases, housing in these areas must be directly impacted. These "set asides" can only be used if the NHT finds that proposals for feasible housing projects can be developed in such areas. Jobs linkage funds must also be allocated so that no less than 20% of any jobs linkage payment be reserved for use in the area surrounding the development project.



A developer may opt for any combination of the above payments or creations in order to meet its linkage obligation. The choice a developer makes is detailed in the DIP agreement made with the BRA. The DIP agreement lists the total housing and jobs obligation of the developer along with a payment schedule or housing agreement, whichever applies. The NHT and NJT are responsible for receiving the linkage payments once a DIP agreement is executed as well as approving the distribution of these funds. The purpose and history of these Trusts can be found on the next few pages.

The Neighborhood Housing Trust

Low income is considered to be household income at or below 50% of the median income and moderate income is at or below 80% of median income for Boston. In 1998, the median income is \$40,000.

The NHT was established by ordinance in 1986 and confirmed by Chapter 371 of the Acts of 1987. The purpose of the Trust, as stated in the *Declaration of Trust*, is “....to mitigate the extent to which Boston’s low or moderate income households are unable to afford decent, safe and sanitary housing within the City of Boston. Towards that end the trust shall help to create and retain the supply of housing for low or moderate income residents of the City of Boston...” Basically, the NHT was created to receive the linkage fees as well as to decide how the funds will be distributed. The NHT consists of seven Trustees: a City Councilor appointed by the President of the City Council, the Collector-Treasurer (CFO) and five Mayoral appointees. The Collector-Treasurer serves as Managing Trustee and is responsible for maintaining the financial records of the Trust and administering the Trust. The Trust, through the Department of Neighborhood Development (DND - formerly known as Public Facilities), requests proposals for housing development projects. The DND is the primary department charged with managing housing projects and ensuring that the developer complies with the vote of the Trust. In addition to this responsibility, the DND is the department charged with improving the city’s housing stock, redeveloping properties for affordable housing, providing housing for those most in need and preserving attractive neighborhood business districts.

Since its inception in 1986, the NHT received and awarded funds in every year except 1996. That year, the NHT Trustees were inactive and did not award any funds despite revenues being received by the Trust. In 1997, the Trust was reactivated as new Trustees were appointed and the Trust awarded \$2.7 million in linkage funds to seven housing projects across the city for rental housing. In the spring of 1998, the Trust expressed the desire to commit \$3.0 million for cluster housing. Cluster housing involves the new construction of home ownership opportunities on vacant, city-owned land. During the past few meetings, the Trustees have begun to clarify their strategy regarding the distribution of future linkage payments. Preliminary discussions indicate that the Trust will first examine the overall housing needs of the city and the areas where funds have already been distributed. Housing needs could include, but not be limited to, rental housing, single family homes, elderly housing and rehabilitation of abandoned housing and vacant lots. Once this analysis is complete, funds are expected to be distributed to areas of the city most in need. Citing the unique needs of each neighborhood in the city, the preliminary Trust policy is to meet those needs on an individual neighborhood and project basis. However, the Trustees have not formally voted or stated that this is an unanimous direction they plan to pursue.

The Neighborhood Jobs Trust

The NJT was established by ordinance in 1987 to receive linkage fees from developers in relation to job training. The purpose of the Trust as stated in the *Declaration of Trust* is to “protect and provide continued and future employment and promotional opportunities for Boston’s low or moderate income residents.” The NJT consists of three Trustees: the Collector-Treasurer and a City Councilor and one Trustee, both appointed by the Mayor. Proposals for job training programs are evaluated, approved and monitored by the Trustees of the NJT along with the Mayor’s Office of Jobs and Community Services (JCS) and the Economic Development Industrial Corporation (EDIC).

Acknowledging the limited resources raised from the jobs portion of linkage, the Trust has made it a priority to use its resources to compliment existing training programs. The Trust has established a policy of assessing the job needs of Boston’s neighborhoods and then targeting job training funds to those needs. The Trust money is used to enhance programs already in the community with a proven track record and that meet the needs of the community at-large. The Trust supports such services as job training and retraining, job placement services, adult literacy and alternative education programs, and related supportive services. The NJT looks to fund cutting-edge training activities that will eventually result in high wage employment or non-traditional employment opportunities.

The Trust allocates funds to programs based on a concept paper or full proposal. The Trust reserves the right to accept or reject a concept paper and it usually requires the submission of a complete proposal to support a concept paper where it has interest. If a developer chooses Jobs Creation, the developer’s proposal must be approved by the Trustees on criteria including its capacity, either directly or through established links with training providers, to provide effective outreach and recruitment, assessment, training and placement services to program participants. Funding requests are evaluated by the Trustees with staff support from the JCS and EDIC on the basis of demonstrated need, effectiveness of approach and cost effectiveness.

The DIP Process

The City’s DIP process involves several departments starting with the BRA. The BRA, as authorized by Article 80 of the Boston Zoning Code, is responsible for the review of development projects and plans in certain instances. For example, if the BRA’s Large Project Review Process determines that a large project is in need of zoning relief and contains more than 100,000 square feet, the DIP provisions of Article 80 are applied to the project. Following the initial stages of the process, the BRA

Board, upon request of its staff, must hold a public hearing on the entire project. The Board then votes to authorize the Director of the BRA to enter into a DIP agreement. The DIP agreement is a standard agreement between the BRA and the developer that contains the DIP requirements as set forth in the Zoning Code. Once the DIP agreement has been executed, the BRA Executive Director/Secretary certifies to the Boston Zoning Commission or the Zoning Board of Appeal, as appropriate, that the developer of a DIP project has signed a DIP agreement. Zoning relief can then be granted. The executed DIP agreement is also sent to the Treasury Department which is responsible for collecting the payments due to the NHT and the NJT.

After zoning relief has been granted, the developer of a DIP project can proceed to obtain a building permit from the Inspectional Services Department (ISD). A Certificate of Compliance is issued by the BRA Director prior to the issuance of a building permit. A building permit cannot be issued if the Certificate of Compliance has not been issued confirming that the DIP project has complied with all the applicable sections of Article 80, including the DIP agreement.

In the past, information regarding DIP agreements was not shared on a regular basis between the BRA and the Treasury Department. The current sharing of this information is a marked improvement in the process. However, procedures for the Treasury Department to obtain the building permit dates and the certificate of occupancy dates are still not clearly defined. These two dates are the key triggers to determine when a developer must begin payment of its linkage obligation. Once the Treasury Department determines the starting date of linkage payments, it bills the developer and can assess late fees for any delinquent payments.

Management Problems

Problems have centered around a general lack of attention, inadequate record keeping, no one department responsible for the program, the lack of a billing process...

The City's administration of the linkage program has been hindered by several years of problematic management. Since its inception, no less than five departments have been involved with some aspect of the administration and implementation of the linkage program. The administration of this program has suffered from a lack of communication or exchange of information among these departments. This bureaucratic structure, whether due to lack of attention or mismanagement, has failed in its attempt to efficiently and effectively manage and carefully track the linkage program. Problems have centered around a general lack of attention, inadequate record keeping, no one department responsible for the program, the lack of a billing process, vacant positions on the NHT and many internal communication problems that inhibited the effective management of the linkage program. Both linkage revenues and expenditures were not regularly tracked by the City. In its own 1996

study, the City acknowledged the lack of coordination and communication among departments as well as its failure to carefully manage the financial aspects of the linkage program.

Inadequate Record Keeping

Decentralized and poor record keeping in the past has been an impairment to any precise calculation of total revenues and expenditures of the linkage program. The City has made a considerable effort to calculate the financial information, however, the results are still not satisfactory. Additionally, records are scattered throughout city departments, making it difficult to get an accurate report of past linkage finances. The City can only confidently express that there appears to be no major known obligations of the Trust. Due to the lack of confidence in past financial information, revenue and expenditure data used in this report are treated as estimates.

Lack of Responsibility and Communication

The overall management of the linkage program is not the responsibility of any one department. Instead, the responsibilities are divided among several departments and the communication among these departments has not been effective in the past. No clearly written guidelines exist that describe each department's role and responsibility in the linkage program and which department has overall responsibility for the entire program. Additionally, there is not a reliable process for the exchange of building permit information between the Treasury Department and ISD. The permit information is a key trigger for when payments must be made to the Trusts.

Direction of the NHT

The NHT has not set a clear path for how it plans to distribute linkage funds. After no activity by the NHT in 1996, the Mayor brought new focus to the linkage program by appointing new members to the NHT. However, the NHT is only in the planning stages of defining its strategy for awarding linkage funds. Recent awards were not made from a strategic point of view and reflect the lack of policy direction of the NHT. The NHT has begun to identify priorities and has requested the Mayor's Housing Advisor and the DND for information that will allow it to approve linkage awards based on identified housing needs in Boston. The NHT rules and regulations are in the process of being updated but have not been completed.

The City's Response

With new development looming on the horizon, and recognizing its past management problems, the City in 1997 began an effort to re-energize the linkage program. Primarily through the Office of the CFO, efforts were initiated to improve the financial management of the linkage

operation. This effort focused on the following:

- The Treasury Department assumed responsibility for improving the financial management of the linkage program and, in conjunction with other departments, spent a considerable amount of time attempting to reconcile past financial records and pursuing delinquent accounts. Re-creating linkage history was a daunting task and one that, due to the previous lack of structure, cannot be completed to the satisfaction of all involved. Instead, the City has had to settle for the most accurate data it could confirm over the last year. Missing bank statements, developer payments, building permit dates and other key financial documents hindered all attempts at a firm reconciliation of historical records. Due to the magnitude of the problem, it does not appear that past revenues and expenditures can be reconciled fully.
- The Treasury Department established procedures for billing developers. In the past, bills were never sent to developers.
- The Office of the CFO has worked to improve the communication and flow of information among city departments involved in linkage.
- New Trustees were appointed to the NHT in 1997. Since that time, the NHT has held meetings and is currently updating the rules and regulations of the Trust. In the fall of 1997, the Trust awarded \$2.7 million for housing. In the spring of 1998, \$3.0 million was identified for cluster housing (see NHT section on page 6).

ROLE OF THE CITY COUNCIL & MAYOR

Chapter 371 stipulates that all linkage funds must be accepted by the City Council and approved by the Mayor. This is a procedural responsibility similar to the process undertaken for accepting grants made to the City. For linkage funds to be accepted by the City Council, an order must be submitted by the Mayor requesting acceptance. This requirement does not give the Council or Mayor the authority to change a DIP agreement or earmark how the funds should be distributed.

Starting in 1987, the City Council began accepting the *annual* installments of linkage payments from developers. This practice continued through 1991, after which no votes were taken by the Council. Despite the fact that the NHT was continuing the collection of annual payments from developers, the Administration did not continue the practice of submitting orders requesting acceptance and expenditure of

funds to the City Council. Exhibit 1 lists the estimated payments received by the NHT from fiscal 1992 through June of fiscal 1998. The funds received and expended during this time were not properly accepted by the City.

Not only were the funds from fiscal 1992 through 1998 not properly accepted by the City, but there is some question as to why the Administration pursued the practice of submitting orders to the Council for accepting the *annual* installment of linkage payments. Chapter 371 states "...the *total amount* of all such payments to be made by a developer to such trusts shall first be accepted by the city council and approved by the mayor, which acceptance shall be deemed a final appropriation of said payments to such trusts." The Administration should have been submitting the total linkage payment to the City Council for acceptance, not the annual payments.

Linkage Revenues

Despite all of its problems and questions, the housing component of the linkage program has collected revenues estimated at approximately \$47.5 million from March 1987 to June 1998. The job component of the linkage program has collected an estimated \$5.4 million from August 1987 through June 1998. Payments owed but not yet collected totaled \$341,263 for the Housing Trust and \$114,418 for the Jobs Trust as of June 30, 1998. As a result of the timing sequence of the linkage payment process, the first linkage payments were not due until fiscal 1987 despite the approval of the program in 1983. As of June 30, 1998, uncommitted NHT funds totaled \$4.5 million and NJT uncommitted funds totaled \$352,478.

Included in the estimated revenue of \$47.5 million, is \$10.5 million in revenue from a financing effort the City undertook in 1989. This effort allowed the City to speed up the flow of cash into the NHT so that it could be dispersed for immediate housing needs. Through this method, the City sold a portion of the future stream of linkage payments it expected to collect to two insurance companies at a discounted rate in return for a lump sum payment from these sources. The Prudential Insurance Company purchased \$5 million in linkage revenue at a discount rate of 9.25%, generating \$3.1 million to the NHT on December 5, 1989. The Metropolitan Life Insurance Company purchased \$10.7 million in linkage revenue at a discount rate of 9.375%, generating \$6.4 million and \$1.0 million to the NHT on December 8, 1989, and January 19, 1990, respectively. The table below shows the revenue stream purchased by the insurance companies. In some cases, the City sold only a portion of the revenue stream. In those cases, the City usually received the revenue stream from the projects in the initial years and sold the later years at the discounted rate (Exhibit 2). This sale basically took the City out of the collection business for this linkage stream and gave the NHT an immediate stream of cash to fulfill housing needs in the city.

METROPOLITAN & PRUDENTIAL LIFE FINANCING

	TOTAL OBLIGATION	TOTAL DUE MET/PRU *	TOTAL PAID TO CITY BY MET & PRU **	COST TO THE CITY
MET	\$18,054,940	\$10,715,136	\$7,453,030	(\$3,262,106)
PRU	5,600,000	5,025,000	3,052,853	(1,972,147)
TOTAL	\$23,654,940	\$15,740,136	\$10,505,883	(\$5,234,253)

* Met & Pru only purchased a portion of the revenue stream and not the whole obligation.

** Based on a discount rate of 9.25% = Pru and 9.375% = Met.

Linkage Awards

Housing Accomplishments

According to the City, an estimated \$42.1 million in linkage funds has been awarded for housing development since the inception of the program. These funds have supported an estimated 68 housing developments across the city and contributed to the creation of approximately 4,828 units of housing. Approximately, 4,112 or 85% of the units are considered affordable. Of the 68 housing developments created, linkage funds, for the most part, accounted for under 30% of the total development cost of the project. Only in one instance, the Bridge Over Troubled Waters development in Allston/Brighton, did linkage funds almost completely fund the project. In the past, linkage money generally was allocated to fund low and moderate income housing through the renovation of old buildings and schools as well as to assist in the creation of new housing. Projects have included rental units; single room occupancy such as housing for pregnant, homeless women and alcohol recovery programs; condominiums; housing cooperatives and home ownership. In addition to the \$42.1 million awarded, approximately \$907,621 has been added for a reserve and other expenses, bringing total expenditures from the NHT to \$43.1 million.

Of the estimated \$42.1 million spent, 71% was awarded during the first five years funds were distributed (1986 to 1990). Approximately, 63% of the units were accounted for during this same time. Trust awards on a calendar year basis have ranged from a high of \$10.5 million or 25% of total revenues in 1989 to a low of \$225,000 or 1% of the total in 1993 (table below). In 1996, no funds were awarded by the Trust. The number of units funded from linkage reached a high of 1,497 in 1987 and a low of 21 in 1993. Of the awards made by neighborhood, Roxbury received approximately 33% of the total funds and the South End 22% of the total funds. Other neighborhoods each received less than 10% of the awards (Exhibit 3). The awards by neighborhood reflected the needs of each community as well as available opportunities to create housing within those areas.

Calendar Year	Award Amount	Total # of Units	# of Affordable Units	Total Development Costs	Awards as % of total	Units as % of total
1986	\$450,000	46	18	\$4,000,000	1%	1%
1987	7,810,138	1,497	1,339	139,920,672	19%	31%
1988	7,314,274	438	343	50,541,299	17%	9%
1989	10,466,625	853	709	82,429,809	25%	18%
1990	3,814,800	202	198	22,465,320	9%	4%
1991	4,517,020	605	349	96,763,213	11%	13%
1992	2,639,900	150	119	19,947,945	6%	3%
1993	225,000	21	21	712,108	1%	0%
1994	1,325,871	45	45	7,200,000	3%	1%
1995	907,000	151	151	10,974,784	2%	3%
1996	-	-	-	-	0%	0%
1997	2,675,000	820	820	55,633,723	6%	17%
GRAND TOTAL	\$42,145,628	4,828	4,112	\$490,588,873	100%	100%

Source: City of Boston Mayor's Housing Advisor and Department of Neighborhood Development

HOUSING HIGHLIGHT

Langham Court, a cooperative housing project, is often referred to as an example of a successful housing partnership between the community and a developer. Langham Court, a mixed income housing development that is part of the South End Neighborhood Housing Initiative (SENHI), utilized linkage funds to finance its construction. In 1986, the SENHI goal was to develop residential housing on vacant public land previously designated to be used for affordable housing. With significant community input, the availability of vacant land, a dire housing need and the demolition of the elevated MBTA and reconstruction of Washington Street, the SENHI had the potential to offer significant improvements for the South End/Lower Roxbury

Neighborhood. According to all accounts, that potential was achieved with the development of Langham Court.

Langham Court consists of 88 units, with 56 offered at affordable rates and 32 offered at market rates. The project also included 51 underground parking spaces. As shown in the figure below, construction costs totaled \$13.5 million, of which 17% came from linkage.

MHFA	\$4,794,503	36%
City of Boston Loan	\$4,877,426	36%
Linkage	\$2,308,000	17%
State	\$500,000	4%
Owner Cash	\$1,020,071	8%
TOTAL	\$13,500,000	100%

Jobs Accomplishments

The Jobs portion of linkage is administered effectively and maintains good records regarding the allocation of funds. Management of the Jobs portion is performed on an operational basis by JCS and the EDIC under the guidance of the NJT Trustees. JCS and EDIC staffs work closely with the BRA to identify DIPs that are in the pipeline as well as those developers who plan to create training programs.

Since the addition of Jobs into the linkage program in 1987, 59 job training programs have been awarded linkage funds totaling \$4.7 million. The awards have been made to training programs that fit with the NJT's emphasis on three concepts: (1) model programs, such as school-to-work, family literacy or workplace-based education, (2) community and private sector partnerships and (3) support of neighborhood-based programs that have the capacity to deliver services. Recently, the NJT Trustees voted to fund an assessment of the employment and training needs of South Boston. This analysis is expected to gather information on the current labor market activities and challenges of a cross section of neighborhood residents. The analysis will be used to create training and education programs for South Boston residents based upon need. In addition to the \$4.7 million awarded, approximately \$313,891 has been spent on administration, bringing total expenditures from the NJT to \$5.0 million.

JOBS HIGHLIGHTS

One of the more recent job training programs utilizing linkage funds is the *Seaport Hotel and Conference Center Program*. The World Trade Center Boston and South Boston Community Housing, Inc. have collaborated to develop a jobs creation program for the training and placement of residents into permanent positions in the hospitality industry. A total of \$56,400 in NJT funds support this project, which to date, has placed approximately 60 residents in mostly full-time positions at the hotel.

The Beth Israel/Deaconess Medical Center *Walk to Work Program* also receives NJT funds to support its work. This program is a collaboration between the medical center and several community groups and received a total of \$140,753 from the NJT. The program targets Fenway residents for medical secretary or surgical technician training or English as a Second Language (ESL). Most students who participate in the ESL classes were already employed by Longwood Medical Area institutions. A total of 36 residents were trained and 15 placed in health care industry jobs.

Future Linkage Revenue

Over the next 30 years, linkage revenues have the potential of reaching an estimated \$123 million. This estimate will change depending upon the real estate market, a downturn in the economy or developer interest in the city. The \$123 million in revenues can be categorized as coming from three areas: (1) revenues from DIP agreements that have already been signed, (2) revenues from potential projects that are in the BRA development pipeline and (3) revenues from potential projects located in the Seaport District of Boston. Linkage revenues due to the NHT from agreements already signed are expected to total \$13.0 million and be collected over a 16 year period from fiscal 1999-2014. Almost half of this total is expected to be collected in the first five years, reflecting the end of receiving payments from projects constructed in the late 1980s to early 1990s. Linkage revenues due to the NJT from existing agreements are expected to total \$1.2 million and be collected over the four years from fiscal 1999-2002. Despite the difficulty of projecting linkage revenues from pipeline projects, an estimated \$13 million is expected from projects that will most likely come to fruition over the next 9 years. Another \$30 million could be received from pipeline projects that are less certain to proceed to completion. In the Seaport District, an estimated \$66 million in linkage funds is projected over a 30 year development cycle.

PROJECTED LINKAGE REVENUES

Existing DIP Agreements			
Housing	\$13.0M	from 1999-2014	
Jobs	\$1.2M	from 1999-2002	
Pipeline Projects			
Likely	\$12.6M	from 1999-2007	
Potential	\$30.0M	from 1999-2007	
Seaport District	\$66.0M	over 30 years	
Projected Total	\$122.8M	over 30 years	

THE CONVENTION CENTER AND LINKAGE

The most recent development concerning linkage involved the City Council's approval of the convention center project in South Boston. The City Council approved the convention center project on March 11, 1998. At that time, the debate centered on the City's ability to fund its share of the project and what general mitigation services could be provided for the impacted neighborhood of South Boston. As part of the Council's approval, a separate order was passed regarding the allocation of linkage funds from the development of a headquarters hotel. A memorandum of understanding (MOU) also was signed by the Director of the BRA and the Senator, Representative and District City Councilor from South Boston as individuals regarding the allocation of linkage funds. The Mayor did not sign this MOU. Neither the order or MOU are self-executing and both will require approval from other public entities or legislative change to be executed.

The MOU contains a provision involving both housing and jobs linkage. The BRA, working with the NHT and NJT, is required in the MOU to establish an aggregate annual goal of allocating no less than a majority of housing and job linkage derived from new development within the Seaport District as a community benefit to the residents of the impacted neighborhood of South Boston pursuant to Articles 26A and 26B of the Boston Zoning Code.

This MOU must conform with Chapter 371 of the Acts of 1987, Article 80, 26A and 26B of the Boston Zoning Code and the Declaration of Trust for both jobs and housing. The legislation clearly states that the NHT and NJT are responsible for distributing linkage funds into areas

and projects they see fit. Furthermore, the legislation stipulates that at least 10% of the housing contribution grants from developers in the downtown area and 20% of the grants from developers outside of downtown be designated for the impacted neighborhood provided that it is agreed upon by the Trustees of the NHT. For the jobs contribution grant, no less than 20% of any grant must be reserved for use in the area surrounding the proposed project. Any linkage funds that are coming to the City from the development of the Seaport District will have to, by state law and city regulations, proceed through the established linkage route.

In order for the provision of the MOU to be fulfilled, one of the following would have to take place: (1) as linkage revenues from the Seaport District flow into the NHT and the NJT, the BRA would have to request both Trusts to vote for those funds to be earmarked for the South Boston area or (2) individual developers would have to choose housing creation when they are signing a DIP agreement, but that would require that they have a specific housing creation development targeted or (3) the zoning regulations would have to be amended to give the BRA the power to designate where linkage funds should be targeted.

The same laws and process will be required to implement a City Council order that was approved on March 11, 1998. One section of this Order requires that "all of the housing and jobs linkage deriving from development of the Headquarters Hotel, shall through the NHT and NJT, be for the benefit of residents of the impacted neighborhood....." The key here is that the NHT and NJT are the only legally authorized entities that can approve funds to specific areas.

Payment On Top Of Linkage

In addition to the requirements of linkage, developers are often required to provide for physical improvements or monetary commitments over and above linkage. Improvements negotiated with the developer may include public realm projects such as traffic improvements, road, sidewalk and lighting work or other area enhancements such as parks or walkways for the public. Monetary commitments may involve financial support for a particular neighborhood project, civic organization or charity. For example, a developer could negotiate to build housing in a particular neighborhood or financially support a local YMCA. These additional requirements of developers are left solely to the negotiation process but do raise the bar of the cost of developing in Boston.

RECOMMENDATIONS

Linkage is here to stay as a formal, institutionalized requirement of the development process in Boston. Given the projected growth of development in Boston, linkage is an important program that will generate significant resources over several years. However, if developers are required to participate in linkage as a condition of gaining zoning approval, they and the public should be confident that the linkage program is managed efficiently and that all linkage funds are spent responsibly to meet the real housing and job needs of Boston. To help ensure this need is met, the Bureau makes the following recommendations:

LINKAGE: THE RESPONSIBILITY OF ONE DEPARTMENT

To avoid repeating the mistakes of the past and to ensure that the linkage program is successful in the future, one department should be responsible for the overall implementation and management of the linkage program. This department should coordinate the linkage work of all departments involved, facilitate communication among departments, monitor DIP agreements and provide assistance to the NHT and NJT and ensure they are meeting the requirements. Currently, each department performs its duties without the benefit of a broader perspective and without a formalized collaborative effort. One department is needed to ensure the team approach to linkage is working. Entrusting the overall responsibility of linkage to one department essentially institutionalizes the program and reduces the possibility of the linkage program succumbing to neglect once again. Over the past month, the City has begun to address this issue by forming a linkage team with the BRA taking the lead.

The Bureau believes this coordinating responsibility should lie with the BRA and be included as part of its mission. Currently, the BRA is

charged with implementing the beginning stages of a DIP agreement, is responsible for housing creation agreements and is the department legally responsible for structuring the linkage program. Additionally, the BRA should participate actively in the meetings of the NHT and NJT and bring departments together on a regular basis to address issues or problems. The Treasury Department should continue the financial management of linkage, ensuring accurate reporting, compliance and support for the NHT and NJT as required. The Mayor's Housing Advisor and the DND should continue to fulfill the housing roles and project management they currently perform. The Office of JCS should continue in its role of establishing and monitoring the overall job-training program.

When establishing linkage agreements with developers, the BRA should ensure that the standard agreement, based on the Zoning Code, is followed at all times so that all developers are kept on the same level playing field. That has not always been the case. For example, the new Boston Garden was an exception with the developer allowed to pay a housing contribution over 30 years and the jobs contribution over 50 years.

POLICY MANUAL NEEDED

The BRA, as the administrator of the linkage program, should develop a policy manual that clearly outlines the roles and responsibilities of all departments involved in the linkage program. A policy manual will ensure that everyone involved in linkage knows what the process is and who to contact during various stages of the linkage process. This document should also formalize the process for exchanging DIP information as well as building and occupancy permits among all departments. The manual should also include the process for housing creation agreements and communicating the quarterly reports proposed in the housing creation recommendation of this report. Currently, the formal ties are based on individuals rather than institutionalized within departments. Past problems with the housing portion of the linkage program can be attributed to the lack of clearly defined roles and responsibilities of the departments involved.

BUILDING and OCCUPANCY PERMIT DATA

As custodian of the linkage program, the BRA, in conjunction with the Treasury Department and ISD, should develop a process for exchanging building and occupancy permit data. The dates of issuance for these two permits are key triggers for the payment process to begin. Currently, there is not an easy and reliable method for obtaining this information. A process must be outlined and enforced so that an additional burden is not placed on the developer. A proposal has surfaced requiring developers to usher a form from the BRA to Treasury before a permit can be issued by ISD. This is not an option the City should pursue. Mechanisms already exist that could solve this problem without requiring the developer to

jump through more hoops. Currently, the BRA upon signing a DIP agreement includes an estimated total payment as well as a schedule of payments for the developer. As key departments in any development project in the city, the BRA and ISD each have up-to-date information on the granting of permits and need to develop a process for sharing that data with the Treasury Department.

FINANCIAL MANAGEMENT

The CFO should continue to closely monitor the financial management of the linkage program. Duties should include tracking both the revenues and expenditures of the Trusts. The CFO should provide the NHT and NJT with expected cash flow data by year to give a broader view of what resources may be available over time. A projected cash flow will help the Trustees to think strategically about the linkage awards. However, actual funding decisions by the Trusts should be based only on the revenue actually collected and uncommitted.

In order to maximize the flow of revenues into the Housing Trust, the City in the past has sold future linkage cash flows to two insurance companies. This is an appropriate process for the City to follow if: (1) the City improves its track record of monitoring housing and job finances, (2) an analysis of where the funds are needed is produced and (3) the discount rate makes it financially feasible. The Bureau believes that a sale of cash flows should not be undertaken until the City can demonstrate that its tracking of linkage revenues and expenditures is in order and that it has developed a strategic housing analysis and plan.

HOUSING CREATION

The BRA should track and monitor all housing creation agreements, payments and projects. Any funds that are required to be paid up-front by a developer should be deposited in an escrow account. According to Chapter 371, housing creation funds are not revenues of the NHT and as such are not required to pass through the NHT. However, there is a need to track housing creation funds on a regular basis. The BRA is the department responsible for negotiating housing creation agreements and all agreements must be in accordance with the BRA rules and regulations. Past monitoring of housing creation funds has been weak and an established process for recording these projects does not exist. As part of this monitoring process, the BRA should prepare quarterly reports for the NHT and CFO specifying all funds received and expended and the purpose of these funds as well as delinquencies or projects that were terminated.

DIRECTION FOR THE NHT

The NHT should establish a strategic direction for awarding linkage funds. Recent awards have been implemented primarily to activate the Trust and direct money into housing quickly. The Trust should take a

more strategic view of its role by assessing housing needs in the city, setting criteria for the award of linkage funds and determining where funds would be used best. The awards of NHT should compliment existing housing funds as well as be a catalyst for housing creation. The NHT should review ways to maximize funds for housing projects and speed-up the process for bringing housing on line.

HOUSING POLICY AND NEEDS ASSESSMENT

The City of Boston should establish a comprehensive housing policy for the entire city. Pieces of a housing policy are scattered currently among programs in the DND and are primarily funded by state and federal funds for specific purposes such as low income, elderly or special needs housing. A comprehensive housing policy should be the umbrella for the NHT in awarding linkage funds. As a start, the Mayor's Housing Advisor, DND and BRA should complete a comprehensive needs analysis of housing in Boston. The JCS identifies the job needs of various neighborhoods and then targets job training to those needs. The NHT should require a similar process, prioritizing housing projects in order for its limited funds to be applied where it will serve the greatest need.

TECHNOLOGY AND THE LINKAGE PROGRAM

The City's new computer system that will be installed over the next few years should include a feature to allow for the financial management of both Trusts as well as including mechanisms to facilitate the exchange of linkage data among departments. Currently, these two Trusts are not part of the existing centralized financial system. The new system should track revenues and expenditures of both Trusts and improve the communication and exchange of information among departments. Computerized information should include, but not be limited to, program revenues and expenditures, housing and job project status, building permit and certificate of occupancy data, completed DIP agreements and projected linkage cash flows.

CITY COUNCIL AND MAYOR

The City Council and Mayor should accept and approve linkage funds as stipulated by Chapter 371. Additionally, all reports and audited statements should be submitted to the City Clerk and Council as required. Linkage awards should be made only by the NHT and NJT.

NEIGHBORHOOD HOUSING TRUST

Schedule of Receipts by Fiscal Year

Fiscal Year	Total Collected	Variance	% Change
FY'98	\$2,112,106	\$85,895	4%
FY'97	2,026,210	490,640	32%
FY'96	1,535,570	-480,270	-24%
FY'95	2,015,840	-870,630	-30%
FY'94	2,886,471	374,615	15%
FY'93	2,511,856	-826,722	-25%
FY'92	3,338,578	1,746,903	110%
FY'91	1,591,674	-15,339,675	-91%
FY'90 **	16,931,350	15,488,756	1074%
FY'89	1,442,594	198,389	16%
FY'88	1,244,205	1,135,009	1039%
FY'87	109,196	N/A	N/A

SUB-TOTAL \$37,745,649

BRA FUNDS \$9,765,200 *

GRAND TOTAL \$47,510,849

* The Boston Redevelopment Authority (BRA) recorded \$9.8 million in linkage revenues. The fiscal year(s) in which these funds were collected is not available. These funds are part of the total amount awarded by the NHT.

** Includes \$10.5M in revenue from financing strategy with Met Life and Prudential insurance companies.

Source: City of Boston Treasury Department and Neighborhood Housing Trust Financial Reports

NEIGHBORHOOD JOBS TRUST

Schedule of Receipts by Fiscal Year

Fiscal Year	Total Collected	Variance	% Change
FY'98	\$454,586	\$98,558	28%
FY'97	356,028	-47,250	-12%
FY'96	403,278	308,289	325%
FY'95	94,989	-105,894	-53%
FY'94	200,883	-564,187	-74%
FY'93	765,070	422,039	123%
FY'92	343,031	213,665	165%
FY'91	129,367	-67,431	-34%
FY'90	196,798	-989,590	-83%
FY'89	1,186,388	-47,950	-4%
FY'88	1,234,338	N/A	N/A

GRAND TOTAL \$5,364,755

Source: City of Boston Treasury Department and Neighborhood Jobs Trust Financial Reports

Note: All figures are treated as estimates by the Bureau.

METROPOLITAN & PRUDENTIAL FINANCING

Project	Terms (yrs) *	Project Size (sq sf.)	Total Due Met/Pru
Metropolitan Life			
500 Boylston Street	10	594,922	\$2,478,842
101 Arch Street	10	295,977	1,233,238
150 Federal Street	10	437,000	1,820,834
160 Federal Street	8	276,000	920,000
75 - 101 Federal Street	10	465,000	1,937,500
Heritage on the Garden	10	89,000	370,833
125 High Street	5	1,275,385	1,154,946
73 Tremont Street	5	182,500	651,786
15 New Chardon Street	5	41,204	147,157
SUB-TOTAL			\$10,715,136
Prudential Life			
75 State Street	10	615,000	\$2,500,000
222 Berkely Street	12	505,000	2,525,000
SUB-TOTAL			\$5,025,000
GRAND TOTAL			\$15,740,136

* In some instances the insurance companies purchased only a portion of the revenue stream.

Source: City of Boston Treasury Department

HOUSING LINKAGE AWARDS BY NEIGHBORHOOD

Project Name	Neighborhood	Award Amount	Award Amount as % of total	Total # of Units	# of Affordable Units	Total Development Costs (TDC)	Award as % of TDC
Bridge	Allston-Brighton	\$144,820	0.3%	6	6	\$145,000	99.9%
Bowdoin Street	Beacon Hill	\$850,805	2.0%	122	87	\$4,469,803	19.0%
CEDC-Main Street	Charlestown	420,986		26	10	3,800,000	11.1%
Brick/CNY	Charlestown	886,000		50	50	6,000,000	14.8%
CNY Building 104	Charlestown	535,000		46	46	7,200,000	7.4%
253 Main Street	Charlestown	100,000		7	4	NA	NA
Mishawum Park Apartments	Charlestown	500,000		337	337	31,241,672	1.6%
	Charlestown	\$2,441,986	5.8%	466	447	\$48,241,672	5.1%
Oak Street Village	Chinatown	\$1,325,000	3.1%	88	60	\$13,015,500	10.2%
Lithgow	Dorchester	1,100,000		31	16	5,382,160	20.4%
Dorchester Bay EDC	Dorchester	1,095,183		44	44	6,756,000	16.2%
Winston-Lucerne	Dorchester	1,200,000		45	45	6,932,445	17.3%
	Dorchester	\$3,395,183	8.1%	120	105	\$19,070,605	17.8%
Trinity	East Boston	\$418,170	1.0%	16	15	\$1,493,039	28.0%
57 Hemenway Street	Fenway	126,000		14	14	600,000	21.0%
Westland Ave.	Fenway	515,000		63	63	2,640,000	19.5%
McBride House	Fenway	500,000		17	17	2,786,151	17.9%
	Fenway	\$1,141,000	2.7%	94	94	\$6,026,151	18.9%
Bowditch School	Jamaica Plain	685,000		45	45	4,555,587	15.0%
Hyde Square Co-op	Jamaica Plain	603,000		42	42	5,500,000	11.0%
Urban Edge	Jamaica Plain	998,000		50	50	7,400,000	13.5%
	Jamaica Plain	\$2,286,000	5.4%	137	137	\$17,455,587	13.1%
Dorchester Terrace	Mattapan	88,000		11	11	830,000	10.6%
Lorne St.	Mattapan	975,000		60	39	9,104,227	10.7%
Aud.,Bak.,Logue	Mattapan	275,000		37	37	4,500,000	6.1%
Hazel Parks Estates	Mattapan	1,472,800		48	48	5,456,143	27.0%
Vinfen	Mattapan	14,900		10	10	NA	NA
Operation Food	Mattapan	150,000		10	10	475,000	31.6%
	Mattapan	\$2,975,700	7.1%	176	155	\$20,365,370	14.6%
Brick/Back	Mission Hill	\$1,675,000	4.0%	165	105	\$20,000,000	8.4%
Longfellow School	Roslindale	225,522		45	45	5,667,900	4.0%
Longfellow School	Roslindale	99,478				-	-
	Roslindale	\$325,000	0.8%	45	45	\$5,667,900	5.7%
Fountain Hill	Roxbury	450,000		46	18	4,000,000	11.3%
Granite	Roxbury	3,337,951		938	938	71,900,000	4.6%
Casa Esperanza	Roxbury	84,000		25	25	514,000	16.3%
Blue Hill Ave.	Roxbury	200,000		12	12	886,938	22.5%
Infill I	Roxbury	896,274		48	40	9,000,000	10.0%
Roxbury Corners	Roxbury	1,175,000		54	41	9,000,000	13.1%
Dacia	Roxbury	949,000		29	29	4,059,400	23.4%
Boston CWLT	Roxbury	350,000		70	51	6,209,984	5.6%
Garrison Trotter	Roxbury	375,000		15	15	2,500,000	15.0%
Brooks	Roxbury	1,246,000		57	43	8,780,000	14.2%
Parmelee	Roxbury	1,057,000		77	51	11,856,875	8.9%

EXHIBIT 3

(continued)

Project Name	Neighborhood	Award Amount	Award Amount as % of total	Total # of Units	# of Affordable Units	Total Development Costs (TDC)	Award as % of TDC
Douglass Park	Roxbury	75,000		155	33	31,000,000	0.2%
Winslow Court	Roxbury	144,000		24	24	4,000,000	3.6%
Re-Vision House	Roxbury	50,000		10	10	243,615	20.5%
Women's Inc.	Roxbury	86,000		7	7	330,602	26.0%
28 West Cottage	Roxbury	60,000		4	4	300,000	20.0%
47 Thorndike Street	Roxbury	45,000		3	3	140,000	32.1%
Youthbuild	Roxbury	175,000		13	13	712,108	24.6%
Habitat III	Roxbury	50,000		8	8	NA	NA
Stafford Heights	Roxbury	1,227,538		42	42	7,200,000	17.0%
Boston Housing Authority	Roxbury	98,333		3	3	NA	NA
Walnut Community Housing	Roxbury	350,000		35	35	2,365,000	14.8%
Academy Home I	Roxbury	500,000		202	202	12,850,000	3.9%
Urban Edge	Roxbury, JP	750,000		211	201	10,000,000	7.5%
	Roxbury	\$13,986,096	33.2%	2,109	1,868	\$199,029,196	7.0%
O'Reilly School	South Boston	305,000		32	32	2,806,672	10.9%
Monsignor Lyons	South Boston	305,000		10	8	1,125,325	27.1%
South Boston CDC	South Boston	1,153,667		34	34	6,300,000	18.3%
	South Boston	\$1,763,667	4.2%	76	74	\$10,231,997	17.2%
Cortes Street	South Cove	615,000		48	44	3,509,177	17.5%
Leighton Park	South End	765,465		271	203	33,400,000	2.3%
180 Shawmut	South End	1,221,736		40	26	7,500,000	16.3%
TDC 3	South End	390,000		94	62	NA	NA
TDC 3 & 4	South End	1,100,000		NA	NA	4,325,425	25.4%
Langham Court	South End	2,308,000		88	56	13,500,000	17.1%
Taino Tower	South End	650,000		27	18	4,500,000	14.4%
1734 Lodging House	South End	270,000		33	31	2,101,571	12.8%
Low Cost Housing, Inc.	South End	350,000		73	73	8,483,139	4.1%
Pine Street Inn Women's Shelter	South End	500,000		110	110	5,800,000	8.6%
CEEH	South End	407,000		41	41	5,174,784	7.9%
South End Tenants Housing II	South End	500,000		184	184	723,000	69.2%
	South End	\$9,077,201	21.5%	1,009	848	\$89,017,096	10.2%
Lowell Square	West End	\$340,000	0.8%	199	66	\$36,359,957	0.9%
GRAND TOTAL		\$42,145,628	100.0%	4,828	4,112	\$490,588,873	

NA = information not available

Source: City of Boston Mayor's Housing Advisor and Department of Neighborhood Development

NEIGHBORHOOD JOBS TRUST PROGRAM AWARDS & EXPENDITURES

ABCD/SNAP	50,000
Allston/Brighton APAC	29,952
Allston/Brighton APAC	49,980
American Red Cross	18,234
Beth Israel Hospital	14,830
Beth Israel Hospital	125,923
Beth Israel Hospital	162,870
Boston Area Health Education Center	58,884
Boston Jobs Academy	135,187
Boston Jobs Academy	342,172
Boston Jobs Academy	355,000
Boston Technical Center	36,183
Boston Technical Center	63,003
Brigham & Women's Hospital	29,183
Brigham & Women's Hospital	33,447
BU School of Medicine/City Lab	40,000
Children's Hospital	136,699
Chinatown Services Consortium	229,836
Chinatown Services Consortium	233,195
Colonel Daniel Marr Boys & Girls Club	38,446
Condon Community School	24,997
Conference of Boston Teaching Hospitals	120,743
EDCO/New England Aquarium	50,000
Faulkner Hospital	15,000
Federated Dorchester Neighborhood House	37,363
Federated Dorchester Neighborhood House	56,248
Harvard University	185,728
Historic Neighborhood Foundation	30,000
International Institute of Boston	56,108
Interseminarian Project Place	68,450
Jackson/Mann Community School	96,563
Jewish Vocational Services	15,700
Judge Baker Children's Center	49,709
New England Deaconess Hospital	63,000
New England Deaconess Hospital	69,034
New England Telephone	143,754
Office of Civil Rights/Healthy Boston	30,750
Oficina Hispana	40,000
Oficina Hispana	103,371
Operation ABLE	49,500
Parents United for Child Care	27,801
Parents United for Child Care	50,000
Parents United for Child Care	100,000
Parents United for Child Care	100,000
Parents United for Child Care	125,000
Parents United for Child Care	175,000
Parents United for Child Care	175,000
Safe Neighborhoods/Healthy Boston	37,500
South Boston CDC/World Trade Center	56,400
South Boston Neighborhood House	11,496
Strand Theater	6,000
Veterans Benefits Clearinghouse	16,250
Veterans Benefits Clearinghouse	42,647
Veterans Benefits Clearinghouse	58,125
Veterans Benefits Clearinghouse	15,000
Veterans Benefits Clearinghouse	35,833
Veterans Benefits Clearinghouse	41,424
Veterans Benefits Clearinghouse	55,030
YouthBuild Boston	40,838
TOTAL AWARDED	\$4,658,386
Labor Market Study - Northeastern	40,000
Administration	313,891
TOTAL EXPENDITURES	\$5,012,277

Source: Mayor's Office of Jobs and Community Services

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